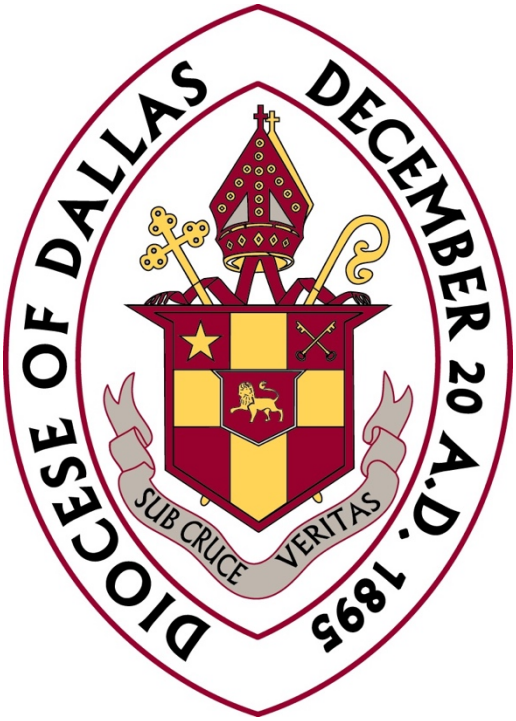

Episcopal Diocese of Dallas

POLICY FOR THE PROTECTION OF CHILDREN, YOUTH, AND VULNERABLE ADULTS (revised 2024)

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Policy for the Protection of Children, Youth, and Vulnerable Adults

I. THEOLOGICAL AND ETHICAL FOUNDATIONS ____ 1

II. EXPECTATIONS AND LOCAL IMPLIMENTATION ____ 3

III. DEFINITIONS ____ 4

IV. APPLICATION AND SCREENING ____ 8

A. Public Records Checks ____ 8
B. Additional Screening Requirements ____ 9

V. EDUCATION AND TRAINING ____ 10

VI. MONITORING AND SUPERVISION OF PROGRAMS FOR CHILDREN AND YOUTH ____ 11

A. Unrelated Adults Required ____ 11
B. Creating Safe Space for Children and Youth ____ 11
C. One-to-One Conversations with Children or Youth ____ 12
D. Basic Needs ____ 12
E. Inclusiveness ____ 13
F. Violence and Weapons ____ 13
G. Behavioral Standards for Adults in Ministry with Children or Youth ____ 13
H. Special Considerations for Off-Site Programming ____ 15
I. Overnight Programs ____ 17
J. Transportation ____ 18
K. Camps and Retreat Centers ____ 18
L. Travel ____ 18

VII. MONITORING AND SUPERVISION OF PROGRAMS FOR VULNERABLE ADULTS ____ 21

A. Presence of Unrelated Adults Suggested ____ 21
B. Creating Safe Space for Pastoral Relationships and/or Ministry ____ 21
C. Inclusiveness ____ 22
D. Violence ____ 22
E. Behavioral Standards for Ministry with Vulnerable Adults ____ 22
F. Visits to Private Residences ____ 24
G. Visits to Residential Facilities ____ 24
H. Off-Site Visits, Events, and Programs ____ 24
I. Transportation ____ 26

J. Insurance for Overseas Pilgrimages and Mission Trips 26
K. International Considerations 26
L. Conference and Retreat Centers 27

VIII. SEXUAL HARASSMENT OF AND BY CHURCH WORKERS 28

A. Prohibited Behavior 28
B. Retaliation 29

IX. RESPONDING TO CONCERNS 30

A. Suspected Abuse, Neglect, or Exploitation 30
B. Sexual Harassment and/or Retaliation 30
C. Suspected Violations of this Policy 32

X. POLICY ADOPTION, IMPLEMENTATION, AND AUDIT 33

A. The Episcopal Church Adoption and Implementation 33
B. Diocesan Adoption, Implementation, and Audit 33
C. Congregation and Organization Adoption, Implementation, and Audit 34

APPENDIX A: SCREENING AND TRAINING PROTOCOLS 35

APPENDIX B: SAFE CHURCH COURSE REQUIREMENTS 36

APPENDIX C: RECOMMENDED PRACTICES AND GUIDELINES FOR SOCIAL MEDIA AND ELECTRONIC COMMUNICATIONS 37

APPENDIX D: GUIDELINES FOR OFFICE DÉCOR FOR PERSONS WHO HAVE PASTORAL RELATIONSHIPS 41

I. THEOLOGICAL AND ETHICAL FOUNDATIONS

"And the Word became flesh and lived among us, and we have seen his glory, the glory as of a father's only son, full of grace and truth."

— John 1:14

God expressed the fullness of humanity in Jesus of Nazareth, whom we worship as the Word made flesh. To be human is to live with God and the whole of creation in the fullness of freedom and the challenge of responsibility. The pattern of Jesus' life, death, and resurrection resonates unreservedly with God's call to perfect freedom and responsibility.

In baptism, God, speaking through the Church, claims us in Christ. We become, in Christ, the community of God's final purpose: justice and peace, love and plenty for the whole creation. This new community lives in Eucharistic fellowship with God and Creation, as a sign and instrument of God's reconciling purpose in the world.

The Church is called to embody and advance God's mission. Ministry is the vocation of the whole community: laypersons, deacons, priests, and bishops who together represent Christ and the Church in the world.

The obligation to seek and serve Christ in all persons and to respect the dignity of every human being is binding for all the baptized. The authority with which ***leaders*** — ordained persons and adults who minister with minors ***(children*** and ***youth)*** and ***vulnerable adults*****,** as well as youth in leadership roles — are entrusted, creates an inherent power imbalance in the ***pastoral relationship***. This power imbalance derives from the leadership role and, in the case of clergy, the symbolic authority of an ordained person. Christian leadership is intended to provide occasions for guidance and grace, and its abuse is always and unequivocally wrong.

Ministry involves a necessary tension between a Gospel-based integrity and a Gospel-based intimacy as modeled by the life of Christ. A rigid adherence to a system of rules leads to an unproductive legalism. Yet, without the framework of the law, the intimate relationships into which Christ calls us risk distortion and harm. All the people of God are called to minister attentively within this tension. These policies are intended to provide a pattern for attentive practice of ministry.

This document is a statement for the Diocese of Dallas, setting forth expectations for its leaders in their relationships with children, youth, and vulnerable adults. The purpose of these policies is to foster the highest standards of behavior in ministry settings. The document includes:

- ***Screening and Training Protocols*** (Appendix A), which explains the level of screening and training required before engaging in ministry with children, youth, and vulnerable adults;

- ***Safe Church, Safe Communities Course Requirements*** (Appendix B)***,*** a description of requisite training that is specialized and tailored to ministry role and function;
- Behavioral standards designed to ensure that children, youth, and vulnerable adults and all who engage in ministry with them are treated with dignity and respect in all settings; and
- ***Recommended Practices and Guidelines for Social Media and Electronic Communications for Vulnerable Adults*** (Appendix C).

II. EXPECTATIONS AND LOCAL IMPLIMENTATION

This policy sets forth statements of general expectations and guidelines of behavior for ordained and lay people in the church when engaged in ministry with children, youth, and vulnerable adults. This policy is mandated for all such activities sponsored by every congregation, institution, organization, school, and agency of the diocese. The purpose of these policies is to create safe and welcoming space for all children, youth, and vulnerable adults in our communities and those engaged in ministry with children, youth, and vulnerable adults, and to prevent sexual abuse.

This policy presents best practices for creating such safe space. Circumstances in many localities may make some of these best practices difficult to implement or even unworkable. As a result, local entities may make additions or revisions in developing local policy so long as they meet or exceed the requirements of these policies. This requires that local leadership understand this policy thoroughly enough to make appropriate judgments about local circumstances. Any such additions or revisions must be submitted in writing for the approval of the bishop. No provisions may be omitted from a local policy.

Church governing bodies and all leaders should understand these policies and all local requirements thoroughly enough to make appropriate judgments, and should consult with the Office of the Bishop when unanticipated situations arise.

No policy can foresee every possible circumstance to which it may be applied. Whenever applicable, questions of civil, criminal, and/or ecclesiastical discipline and employment offenses should be addressed with the relevant authorities immediately. Please contact the Office of the Bishop for consultation and resources if assistance is needed.

III. DEFINITIONS

NOTE: These definitions reflect an understanding of terms describing gender identity and sexuality, which are evolving as these policies are being written.

Adult: Anyone who is 18 years or older and not in high school.[1]

Bullying: Behavior that intimidates, humiliates, offends, degrades, or harms another person, whether verbal, psychological, social, physical, or otherwise.

Child: Anyone under the age of 12 years.[1]

Child Protective Services: A social services program provided by state and local governments serving children and their families who are in need of assistance. Child Protective Services receive and investigate reports of suspected abuse, neglect, and exploitation.

Cisgender: An adjective describing a person whose sense of personal identity and gender corresponds with their gender or sex assigned at birth. This is an evolving term, as our understanding and language around gender identity and sexuality expands and matures.

Gender Non-Binary: An umbrella term for people who identify their gender as neither male nor female. These people might identify as both ("bigender"), neither ("agender"), a mix between the two ("genderfluid"), or they can be unsure of their gender ("genderqueer"). This is an evolving term, as our understanding and language around gender identity and sexuality expands and matures.

Intake Officer: The person(s) designated by each diocese to receive information regarding an offense for which a member of the clergy may be held accountable under *Title IV of the Constitution and Canons of The Episcopal Church,* which sets out the disciplinary process for clergy. Anyone may contact an Intake Officer to report concerns.

Leader: A person, adult or youth, who, for the benefit of another, engages in ministry without responsibility for oversight of others engaged in that same ministry. Examples include Sunday school teachers, camp counselors, and program team.

LGBTQ+: An acronym for Lesbian, Gay, Bisexual, Transgender, Queer/Questioning, and others. It refers to people whose gender identities vary from their gender or sex assigned at birth, or whose sexual orientations differ from the heterosexual majority. The "+" is an effort to include additional gender identities. This is an evolving term, as our understanding and language around gender identity and sexuality expands and matures.

Mandated Reporter: A person who is required by state law to report reasonable suspicions of abuse, neglect, and/or exploitation of vulnerable populations to the

[1] Ages established in accordance with generally accepted definitions in the United States. These ages may vary across the wider Episcopal Church.

appropriate state agency. State laws vary greatly. Generally, state law mandates that either all adults or adults in certain professions report suspected abuse of children and/or youth, elders, vulnerable, and/or dependent adults. It is imperative to know the requirements of applicable state laws. Typically, individuals who are not mandated to report suspicion of abuse may make a report to the appropriate state agency, even though not legally required to do so.

Off-Site: Any location other than the sponsoring Episcopal Church, institution, facility, or campus.

Organizations: All institutions for which the diocese or congregations have legal or fiduciary responsibility (examples: diocesan departments, commissions, conference & retreat centers, adult day care centers, retirement communities, religious orders, congregations, schools, etc.).

Overnight: Any event that starts on one calendar day and ends on a different calendar day.

Pastoral Relationship: Any relationship (1) between a Member of the Clergy and any person to whom the Member of the Clergy provides or has provided counseling, pastoral care, spiritual direction or spiritual guidance, or from whom such Member of the Clergy has received information within the Rite of Reconciliation of a Penitent, or (2) between a lay minister and any person to whom the lay minister is offering prayer, ministry, and/or any person from whom the lay minister has received sensitive, personal, or confidential information in the course of offering ministry.

Programs: Official activities and programs sponsored by The Episcopal Church and its provinces, dioceses, and congregations (examples include: The Episcopal Youth Event, Provincial Youth Events, Happening, Teens Encounter Christ, pilgrimages, mission experiences, New Beginnings, camp programs, Acolyte Festival, etc.).

Public Records Check: A search of documents and data available to the public including criminal and civil court records, credit reports, and driving records from the department of motor vehicles. Typically, such searches are conduct by a third party with expertise in this area.

Residential Facility: Any institutional or group home setting where a vulnerable adult resides on a permanent or temporary basis such as a nursing home, rehabilitation center, assisted living facility, treatment center, or memory care facility.

Responsible Person: The person designated as being accountable for compliance with this policy for an event or program.

Sacramental Use: Consecrated or unconsecrated wine used in the setting of Eucharist.

Sexual misconduct: A broad term encompassing any behavior of a sexual nature that is committed without consent or capacity for consent or by force, intimidation, coercion, or

manipulation. Sexual misconduct can be committed by a person of any gender, and it can occur between people of the same or different gender.

Supervisor: A person who has oversight responsibilities for a ministry program and/or Leaders in a ministry program.

Title IV: A section of the *Constitution and Canons of The Episcopal Church* pertaining to clergy professional standards, accountability and ecclesiastical discipline.

Transgender: An adjective describing a person whose sense of personal identity and gender does not correspond with the gender or sex assigned to them at birth. This is an evolving term, as our understanding and language around gender identity and sexuality expands and matures.

Training: Organized activity designed to provide information and/or instructions to strengthen and enhance the recipient's understanding, capacity, and exercise of ministry.

- **Universal Training**: A standard of training that will foster a culture of safety and inclusion for all people that includes a broad overview of issues of vulnerability, power, and healthy boundaries. This training is designed to equip all people to live out their Baptismal Covenant.
- **Specialized Training**: A standard of additional training that equips people who participate in or have oversight responsibility for ministries. In addition to Universal Training, a person will have access to training that is specialized and tailored to their role and ministry function.

Vulnerable Adult:

- Any adult at or older than the age designated as an elder by applicable state law;
- Any adult who is infirm or diminished in capacity due to age, illness, or disability;
- Any adult who is ministered to in their home (by Eucharistic Visitors, Pastoral Care Visitors, Stephen Ministers, or others);
- Any adult who is wholly or partially dependent upon one or more other persons for emotional, psychological, or physical care or support, such dependency may be temporary as in the case of an accident, illness, or birth of a child; and
- Any adult who by virtue of a crisis, experiences vulnerability leading to dependency on another or lacks agency in a pastoral relationship as in the wake of death of a family member or job loss.

Youth: Anyone who is at least 12 years old, but not yet 18 years old. A youth may also be an individual who is 18 years old or older, and still in high school.[2]

[2] Ages established in accordance with generally accepted definitions in the United States. These ages may vary across the wider Episcopal Church.

IV. APPLICATION AND SCREENING

Dioceses, congregations, and other organizations are required to screen all persons according to the standards in the ***Screening and Training Protocols*** (Appendix A). For some positions, screening consists only of a Public Records Check. For other positions there are additional screening requirements of a written application, interview, and reference verification.

A. Public Records Checks

- Congregations and other organizations shall use a provider approved by the diocese to conduct public records checks. Such checks must be completed before the employee or volunteer begins programmatic interacting with children, youth, and/or vulnerable adults;
- Criminal public records checks shall include all available criminal records and sex offender registries;
- A Department of Motor Vehicles (DMV) records check is needed if transporting children, youth, or vulnerable adults as part of, or an extension of, ministry of the congregation or for a church-sponsored event;
- A credit check is required of treasurers and those with check signing authority; and
- Public records checks must be updated at least every three years.
- Costs vary according to the service used. The organization reviewing the applicant (for staff or volunteer) is responsible for the costs associated with background checks. Recommended services for background checks are:

  Oxford Document Management Company, Inc.
  www.oxforddoc.com

  Publicdata.com
  www.publicdata.com

  Family Watchdog
  www.familywatchdog.us

  Criminal History Conviction Name Search
  Texas Department of Public Safety
  https://publicsite.dps.texas.gov/ConvictionNameSearch/

  Texas Public Sex Offender Website
  Texas Department of Public Safety
  https://publicsite.dps.texas.gov/SexOffenderRegistry/

B. Additional Screening Requirements

Written application, interview, and reference verification are required before serving in certain roles and ministries as specified in the ***Screening and Training Protocols*** (Appendix A).

Code of Conduct forms: (https://edod.org/ministries/safechurch/)

- All persons who have pastoral relationships in the congregation must sign the Code of Conduct for Persons who have Pastoral Relationships.
- In addition, all persons who work with children or youth must sign the Code of Conduct for Working with Children and Youth.

Other forms: (https://edod.org/ministries/safechurch/)

- Job application
- Interview Questions
- Confidential Reference Form
- Questions for References

Potential Leaders or Supervisors must be known and active in the congregation for at least six months before engaging in ministry with children, youth, and/or vulnerable adults, unless they are required to have public records checks and reference checks pursuant to the ***Screening and Training Protocols*** (Appendix A).

Dioceses, congregations, and other organizations must keep and maintain all application and screening records secure and confidential in the diocese, congregation's, or organization's office. This includes a signature by each applicant verifying receipt of a copy of this policy, including any local procedures or variations.

V. EDUCATION AND TRAINING

Training shall be appropriate to each person's function according to the ***Safe Church, Safe Communities Course Requirements*** (Appendix B).

All Leaders shall have Universal Training that fosters a culture of safety and inclusion for all people and covers a broad overview of issues of vulnerability, power, and healthy boundaries. Universal Training is designed to equip all people to live out their Baptismal Covenant. All members of the Diocese of Dallas shall have access to this training.

In addition to Universal Training, all Supervisors and those with oversight responsibilities for ministry programs and/or other adults who engage in ministry with children, youth, and/or vulnerable adults shall have Specialized Training that is tailored to their role and ministry function.

Depending on role and responsibility, Specialized Training should include:

- The prevention, identification, and response to all forms of abuse and neglect, including financial exploitation (in the case of vulnerable adults);
- Mandated and voluntary reporting of suspected abuse, neglect, and exploitation of children, youth, and vulnerable adults;
- Vulnerability within the pastoral relationship;
- An introduction to gender non-binary;
- The needs of LGBTQ+ children and youth and the needs of aging LGBTQ+ individuals who often struggle to find care or residential facilities adequately equipped to meet their needs;
- The ways that children, youth, and vulnerable adults can engage in self-advocacy; and
- The needs of differently-abled children, youth, and vulnerable adults.

Certification of training shall be renewed every three years.

Dioceses, congregations, and other organizations with responsibility for programs with services or ministries to children, youth, and vulnerable adults shall keep records sufficient to evidence compliance with this policy.

VI. MONITORING AND SUPERVISION OF PROGRAMS FOR CHILDREN AND YOUTH

A Responsible Person shall monitor and supervise the behavior of adults, children, and youth to ensure appropriate behavior and healthy boundaries.

All people who minister to children and youth must have ongoing supervision. Ongoing supervision should consist of regular check-ins by the Supervisor who may be parish clergy or a team leader. Such supervision shall review the scope, accountability, and responsibly of the ministry with the person engaged in the ministry. Each person engaged in such ministry should know who supervises their ministry and how to contact the Supervisor at all times.

Dioceses, congregations, and organizations shall ensure that all people who minister to children and youth receive prior training as to the scope, accountability, and responsibility of the ministry.

Dioceses, congregations, and organizations shall maintain an up-to-date list of persons with their contact information approved to minister to children and youth. This list shall be kept in the organization's office or other place where records are kept.

A. Unrelated Adults Required

There shall be at least two unrelated adults (at least two years older than the eldest participant) present at ministry settings and events designed for children and youth. If unanticipated circumstances result in an adult being alone with children or youth, that adult shall report those circumstances to the Supervisor, clergy in charge, senior warden, or Responsible Person as soon as possible.

Only one adult may be sufficient in well-monitored, visually accessible program space on the church grounds, such as a Sunday School classroom, provided that another adult can maintain visual contact with the adult program leader. This can be accomplished by designating an individual to conduct frequent random checks of classrooms and unlocked spaces throughout the building(s). These exceptional circumstances must be specifically described in a written document and approved by the governing body of the congregation. See also sections on ***Overnight Programs*** (Section VI, I) and ***Transportation*** (Section VI, J).

B. Creating Safe Space for Children and Youth

To create a safe space, it is necessary to anticipate and avoid circumstances in which children and youth are exposed to inappropriate consumables, materials, unmonitored adult contact, or unsupervised peer contact.

For example:

- **Alcoholic beverages**. Alcohol (sacramental or otherwise) shall not be stored in publicly accessible areas of the church buildings.
- **Computers and electronic devices.** Children and youth shall have adequate supervision when using electronic devices belonging to dioceses, congregations, and other organizations. Devices shall have adequate password protection. Each user shall have their own account and password. See ***Recommended Practices and Guidelines for Social Media and Electronic Communications*** (Appendix C).
- **Persons with keys and access to locked spaces.** *Anyone with keys or electronic access* to church buildings shall meet all the requirements for screening and training according to the ***Screening and Training Protocols*** (Appendix A) and ***Safe Church, Safe Communities Course Requirements*** (Appendix B).
- **Unused spaces.** Spaces not in use should not be readily accessible. Given the vast differences in facilities, each diocese, congregation, and other organization should determine how best to meet this standard.

C. One-to-One Conversations with Children or Youth

When one-to-one conversations occur between an adult and a child or youth, another unrelated adult is either to be present or capable of visually monitoring the conversation.

Examples include:

- Planned or unplanned on-site conversations can take place in a public location, away from where others can hear but in view of other adults.
- Planned off-site conversations/meetings can take place in a public place (such as a coffee shop or restaurant) in view of other adults. A Responsible Person shall be informed about the appointment or plans in advance.

Confidentiality cannot be guaranteed if a child or youth discloses a situation pertaining to abuse, neglect, self-harm, or exploitation because of mandatory reporting laws.

Impulsive, secluded or secretive activity, online or in person with children or youth, may foster a high-risk situation, and is therefore to be avoided. See ***Recommended Practices and Guidelines for Social Media and Electronic Communications*** (Appendix C).

D. Basic Needs

No one is to be deprived of the basic human needs of food, drinking water, shelter, sleep, access to restrooms, safety, and clothing at any event.

Exceptions may be made for programs intended to teach children or youth about poverty, need, and hunger, such as an intentional fasting program. In these cases, children and youth must agree to participate in writing, and parents or guardians must give written permission that includes certification that the youth or child does not have a medical

condition that would put the participant at risk by fasting or missing sleep. Participants who wish to withdraw or who are unable to complete the program must have their basic needs met immediately.

E. Inclusiveness

No one shall be denied rights, status or access to an equal place in the life, worship, and governance of any program or activity because of race, color, ethnic origin, national origin, marital status, sex, sexual orientation, gender identity and expression, differing abilities, or socio-economic class. To the extent possible, all spaces and settings for programs, activities, and ministry shall be accessible.

The Episcopal Church seeks to support all children and youth by providing reasonable alternative arrangements regardless of state law to address safety and comfort.

Transgender, genderqueer, or gender non-binary children or youth who express the need or desire for increased privacy should be provided with reasonable alternative arrangements. Reasonable alternative arrangements may include the use of a private area, or a separate changing schedule, or use of a single stall restroom. Any alternative arrangement should be provided in a way that protects the child or youth's ability to keep their transgender status confidential. They should not be required to use a locker room or restroom that conflicts with their gender identity.

Safe bathroom/shower facilities will be provided by gender (or specific times will be assigned to the use of a single facility).

Adults should either have separate shower facilities or shower at other times than the youth. Separate dressing facilities should also be provided. See section on ***Overnight Programs*** (Section VI, I).

F. Violence and Weapons

- No one is to strike, hit, or otherwise physically threaten or harm anyone at any time.
- Bullying of any kind by anyone is prohibited.
- Children and youth shall not have weapons of any kind at any event or program for children or youth. Exceptions to this restriction may be made for camp programs or other specific programs with prior approval.
- Report suspected violations immediately. See ***Suspected Violations of this Policy*** (Section IX, C).

G. Behavioral Standards for Adults in Ministry with Children or Youth

Adults who work with children and youth are expected to model the patterns of healthy relationships that children and youth deserve in all settings. Interactions should meet all requirements outlined above, and adults should be discouraged from initiating a private

relationship with any unrelated child or youth from the church away from sanctioned church activities.

DOs

Adults are encouraged to:

- Have ongoing spiritual practices, which might include: daily prayer, regular participation in corporate worship, and Bible study;
- Spend time with and listen to children and youth, and advocate for their ministry within the Body of Christ;
- Offer appropriate physical expressions of care, which may include:
    - high fives and fist bumps;
    - hand-holding while walking with small children or in prayer;
    - brief touching of shoulders, hands, or arms;
    - "laying on of hands" under appropriate pastoral supervision;
    - brief hugs and arms around shoulders; and
- Model appropriate affection with other adults and be accountable to the community for behavior.

DON'Ts

Adults shall not under any circumstances:

- Provide children or youth with non-sacramental alcohol, marijuana, drugs, cigarettes, tobacco products, e-cigarettes, vapes, or pornography;
- Arrive under the influence of alcohol, illegal drugs, or misused legal drugs at any children's or youth event or when they are responsible for children or youth at an event;
- Consume non-sacramental alcohol or illegal drugs or misuse legal drugs at any children's or youth event or when they are responsible for children or youth at an event;
- Engage in illegal behavior or permit other adults or children or youth to engage in illegal behavior;
- Engage in any sexual, romantic, illicit, or secretive relationship or conduct with any child or youth; or
- Apart from planned pre-approved educational programs, discuss their own sexual activities, fantasies, or their own use, or abuse of drugs or alcohol with children or youth.

Anyone who suspects a violation of these policies shall take steps as outlined in ***Responding to Concerns*** (Section IX).

H. Special Considerations for Off-Site Programming

Off-site programs, trips, and events are a welcome and often necessary means for spiritual, social, and emotional development of children and youth. They also present additional challenges for maintaining best practices for safe and healthy ministry. The expectations for safe space, as described above, should be observed off-site.

In the event of uncertainty about application of the policy, the Responsible Person should contact their Supervisor with the relevant queries.

Because of the unique risks that can't always be anticipated, it is important to obtain permissions and manage documentation as described below.

1. Prior Approvals

- Prior approval by the governing body and the member of the clergy in charge is required, and that approval shall be reflected in the minutes of the governing body. Diocesan sponsored programs, trips, or events shall receive prior diocesan approval.
- Written parental approval is required prior to viewing any movie, whether off-site or on-site, rated "PG-13" or above, or participating in any conversation or program containing sexually explicit or violent content.
- These same prior approvals are required when the site is a private residence, hosting such events as cook outs, pool parties, progressive dinners, etc.

2. Registration, Waiver, and Release Forms

- All children, youth, and adults shall complete and sign a registration form and a waiver and release form before participating in any programs. Confidentiality must be preserved with respect to medical and other sensitive information in the forms. Such forms can encompass a program year.
    - There must be a parent/guardian's signature on all release and waiver forms for minors. Please check with your bishop's office concerning whether digital signatures are acceptable in your state.
    - Completed release and waiver forms shall be maintained in a secure location on-site or online. Please check with your bishop's office concerning whether such forms may be saved electronically and the length of time the forms must be saved.

- Permission slips shall be provided for each off-site event and shall be signed by the parent/guardian.
- Prior permission for a minor to be photographed or recorded on film, videotape, audiotape, or other electronic media is required from a parent/guardian.

3. First Aid and Medications

- Current certification in First Aid, CPR, and Automated External Defibrillator (AED) is strongly encouraged for those who work with children and youth.
- A first aid kit, appropriately stocked for the event and participants, shall be available in an easily accessible location.
- A record must be kept for all medication or first aid given to a participant. This record shall include the participant's name, the date and time of service, the name of the person administering medication or treatment, and a description of the medication, dosage, and/or treatment given.
- All medications (prescription and over the counter) belonging to minors shall be given to the Responsible Person, unless otherwise agreed upon by the parents and the Responsible Person. Exceptions may include inhalers, epi-pens, and birth-control pills.
- Only the Responsible Person, or their adult designee, shall administer medications.

4. Supervision

- At any gathering of children or youth, there shall be at least two unrelated adults with one being age 25 or older, preferably reflecting the sex and gender identity of the participants.
- Minimum ratios of adult to child/youth shall be in accordance with American Camp Association (ACA) guidelines as follows:
    - 5 years & younger — 1 adult for each 5 overnight-participants and 1 adult for each 6 day-participants
    - 6–8 years — 1:6 for overnight, and 1:8 for day
    - 9–14 years — 1:8 for overnight and 1:10 for day
    - 15–18 years — 1:10 for overnight and 1:12 for day
- Additional adults can provide skills, mentorship, support, encouragement, spiritual guidance, and joy.
- When you have new leaders-in-training, the leadership teams should also have a reasonable number of experienced adult leaders to provide support.

5. Insurance

All trips to off-site destinations must have adequate insurance in case of emergency. For more information, contact your insurance broker.

I. Overnight Programs

In overnight programing, particular attention will be given to historically excluded or unrecognized people, such as LGBTQ+ and differently-abled individuals. In a situation of unequal power and safety, preferences of these individuals merit additional consideration, accommodation, and action to ensure:

- Participant privacy;
- Maximization of social integration of all participants;
- Minimization of stigmatization of any participants;
- Equal opportunity to participate; and
- Safety of all participants.

Other guidelines for overnight programs:

- The safe use of restrooms and showers by all participants requires dioceses, congregations and other organizations to consider numerous factors, including, but not limited to: age, sex, gender identity and expression, and privacy. Adults should have separate showers or separate times for showers.
- Overnight programs shall provide safe, supervised sleeping arrangements.
    - No bed, cot, or sleeping bag shall have more than one person sleeping in it.
    - Supervision by two unrelated adults is required in any space where one or more youth are sleeping.
    - It is acceptable for all participants to sleep in the same open area when dressing rooms and bathrooms provide appropriate privacy.
- Participants shall have access to three substantial meals each full day and access to sufficient water.
- Participants shall be given the opportunity for at least seven hours of sleep each 24-hour period, except for programs where parental/guardian permission is given to miss sleep. In these cases, children and youth must agree to participate in writing, and parents or guardians must give written permission that includes certification that the youth or child does not have a medical condition that would put the participant at risk by missing sleep.
- Participants shall have some time set aside each day for rest or free time.

Best practice guidelines for hotel stays:

- One child or youth per bed, including cots, pullouts or hideabeds, and rollaway beds;
- At least 2 children or 2 youth in each room.
- Adult supervisors or chaperones have rooms on the same floor, scattered among the rooms with children or youth, and at least one adult room is by the stairs or elevators;
- Adult leader assigns rooms and room occupants;

J. Transportation

- For the health and safety of all participants, the following practices shall be followed: For events that originate and/or terminate at the diocesan, congregation, or organization's facility, all drivers must be at least 21 years of age and provide proof of insurance and a current driver's license, a completed volunteer driver information form, and have a satisfactory DMV records check.
- All drivers and riders must comply with state laws including seat belt and cell phone usage.
- Parents/guardians are responsible for the transportation and safety of their children and/or youth to and from the event. This responsibility includes the transportation of any other passengers in their vehicle.

K. Camps and Retreat Centers

All camps, camping programs, and retreat centers of the diocese shall follow the guidelines for off-site programming established in this policy. In addition, camps should aim to follow American Camp Association standards to the best of the camp's ability.

L. Travel

Travel with children and youth presents amazing opportunities for participants to experience the church and the world on a larger scale with vastly different perspectives of faith communities and their contexts. It also presents challenges to normal safety protocols and opportunities for creativity if managed well. The following policies will help groups prepare for a variety of potential scenarios, as well as for domestic and international travel.

1. Adult Leaders and Chaperones

- Minimum ratios of adult to youth need to be greater due to the possibility of leaving an adult behind with a participant in the event of a medical emergency.
    - 9–14 years — 1:5
    - 15–18 years — 1:7

- Regardless of group size, no group should travel with fewer than three adult chaperones.
- One adult, minimum age 25, should serve as the travel administrator who is responsible for all aspects of the trip, including carrying all necessary documentation, contacts, and forms including:
    - medical releases;
    - community covenant;
    - emergency contacts;
    - itineraries; and
    - cash and/or credit card capacity to address emergencies.
- It is a best practice that, one adult, minimum age 25, should hold a current medical certification to manage administration of necessary and permissible medications, administer immediate and necessary first aid, and triage medical situations to determine if care of an individual needs to be taken to a higher level of care. When this is not possible, one person should be designated to supervise the administration of medications as instructed on medical release forms, and a clinic near your destination should be identified ahead of time in order to respond to health emergencies as rapidly as possible.
- Acceptable medical certifications include:
    - Wilderness Medical Response
    - Outdoor Emergency Care
    - Emergency Medical Technician/Paramedic
    - Nurse — RN/LPN/Nurse Practitioner
    - Physician's Assistant
    - Medical Doctor
- Best practice is to designate an adult to serve as back-up to the travel administrator, and as back-up for simple first aid and administration of prescriptions. These could be the same person.
- A copy of all documents should be left with an accountable person at the diocesan, congregation, or organization's office. That person should also serve as the local emergency contact person for communications between the traveling group and families at home.

2. Insurance for Travel

- Short-term trip or supplemental insurance, available through most church and organization's policies as an added rider, must be secured at-least one month prior to travel.

- It is recommended that all travelers carry evidence of personal health insurance by virtue of a copy of the actual card provided to the insured person.
- Because not all individuals have access to affordable and adequate health insurance, it is recommended that health insurance be added to trip insurance.

3. International Considerations

- Check in with the U.S. Department of State on travel requirements, including visas.
- Make certain that every traveler's passport is valid for at least six months beyond your return date.
- Determine whether or not vaccinations are required and/or recommended for entry into specific countries.
- Arrange to have at least two cell phones with the group that will have active coverage in your destination(s). Make a back-up plan for communication with your Responsible Person at home.
- A more thorough list of international travel considerations with links to U.S. and global organizations can be found in the ***Youth in Mission Manual*** here: **https://www.episcopalchurch.org/wp-content/uploads/sites/2/2020/12/7-traveling_7.pdf**

VII. MONITORING AND SUPERVISION OF PROGRAMS FOR VULNERABLE ADULTS

All people who minister to vulnerable adults and/or have pastoral relationships with others must have ongoing supervision. Ongoing supervision should consist of regular check-ins by the Supervisor who may be parish clergy or a team leader. Such supervision shall review the scope, accountability, and responsibly of the ministry with the person engaged in the ministry. Each person engaged in such ministry should know who supervises their ministry and how to contact the Supervisor at all times.

Dioceses, congregations, and organizations shall ensure that all people who minister to vulnerable adults receive prior training as to the scope, accountability, and responsibility of the ministry.

Dioceses, congregations, and organizations shall maintain an up-to-date list of persons with their contact information approved to minister to vulnerable adults and/or engage in pastoral relationships with others. This list shall be kept in the organization's office or other place where records are kept.

It is best practice for those ministering to vulnerable adults to document their visits, including time, place, and any observations or concerns. Such documentation is reviewed by the Supervisor. Confidentiality among clergy and lay ministers is required and all documentation is kept confidential. This documentation promotes continuity of care and transparency in ministry.

All new activities that include pastoral relationships and/or ministry to vulnerable adults shall have a Responsible Person to monitor and supervise all events to ensure appropriate behavior and healthy boundaries.

A. Presence of Unrelated Adults Suggested

While not required, it is best practice for those ministering to vulnerable adults, or in the homes of others, to do so with another trained adult minister present. Those engaged in such ministries should minister in pairs.

If a diocese, congregation, or organization's policy requires that there be two unrelated adults present, and if circumstances result in a minister being alone with a vulnerable adult, that minister shall report this to the Supervisor, clergy, senior warden, or Responsible Person as soon as possible.

B. Creating Safe Space for Pastoral Relationships and/or Ministry

To create a safe space, it is necessary to anticipate and avoid circumstances that could result in exposure of vulnerable adults to undue influence or exploitation. On-site and off-site settings for ministry with vulnerable adults and pastoral relationships and conversations should:

- Be in places where casual monitoring by others is convenient; and
- Convey safety and comfort.

C. Inclusiveness

No one shall be denied rights, status, or access to an equal place in the life, worship, and governance of any program or activity because of race, color, ethnic origin, national origin, marital status, sex, sexual orientation, gender identity and expression, differing abilities, socio-economic class, or age. To the extent possible, all spaces and settings for programs, activities and ministry shall be accessible.

The Episcopal Church seeks to support all persons by providing reasonable alternative arrangements regardless of state law to address safety and comfort.

Transgender, genderqueer, or gender non-binary adults who express the need or desire for increased privacy should be provided with reasonable alternative arrangements. Reasonable alternative arrangements may include the use of a private area, or a separate changing schedule, or use of a single-stall restroom. Any alternative arrangement should be provided in a way that protects the adult's ability to keep their transgender status confidential, if they so desire.

Transgender, genderqueer, or gender non-binary adults should not be required to use a locker room or restroom that conflicts with their gender identity. Safe bathroom/shower facilities will be provided by gender (or specific times will be assigned for the use of a single facility).

D. Violence

- No one is to strike, hit, or otherwise physically threaten or harm anyone at any time.
- No one is to control or attempt to control another by bullying, intimidation, threats, verbal/emotional abuse, or isolation from others. Bullying of any kind by anyone is prohibited.
- Report suspected violations immediately. See ***Suspected Violations of this Policy*** (Section IX, C).

E. Behavioral Standards for Ministry with Vulnerable Adults

All who work with vulnerable adults are expected to model the patterns of healthy relationships. To this end, lay, and ordained ministers working with vulnerable adults shall:

- Take care not to unduly influence a person to whom they minister;
- Accept only token gifts from those to whom they minister. Ministers given gifts shall report those gifts in writing to their Supervisor, clergy, senior warden, or Responsible Person;

- Decline to accept loans of any kind from those to whom they minister;
- Decline to agree to be named as a beneficiary or to act as an administrator or executor in a will of anyone to whom they minister; and
- Inform Supervisor, clergy, senior warden, or Responsible Person of anything that causes concern for the safety or wellbeing of those to whom they minister.

DO's

All who minister to vulnerable adults are encouraged to:

- Have ongoing spiritual practices, which might include daily prayer, regular participation in corporate worship, and Bible study;
- Spend time with and listen to vulnerable adults, and advocate for their ministry within the Body of Christ;
- Offer appropriate physical expressions of affection, as long as they are welcomed by the recipient. These may include:
    - brief hugs;
    - pats on the shoulder or back;
    - kisses on the cheek;
    - handshakes;
    - holding hands during prayer; and
- Maintain healthy boundaries when sharing personal information.

DON'Ts

Adults shall not under any circumstances:

- Provide vulnerable adults with non-sacramental alcohol, marijuana, illegal drugs, cigarettes, e-cigarettes, vapes, or pornography;
- Arrive under the influence of alcohol, illegal drugs, or misuse of legal drugs when they are responsible for, or ministering to, a vulnerable adult;
- Consume non-sacramental alcohol or illegal drugs or misuse legal drugs when they are responsible for, or ministering to, a vulnerable adult;
- Engage in illegal behavior or permit others to engage in illegal behavior; or
- Engage in any sexual, romantic, illicit, or secretive relationship or conduct with any vulnerable adult.

F. Visits to Private Residences

The safety of all persons and healthy boundaries are essential when visiting a vulnerable adult in a private home.

- Avoid situations that might compromise privacy; common examples include:
  - Visiting behind closed bedroom doors;
  - Sitting on the bed of the person being visited; or
  - Visiting a person while they are not fully clothed.
- The best practice is to visit in teams of two or more. If it is not possible for another adult minister to be present, a member of the vulnerable adult's household should be present. If neither is possible, documentation of the time, duration of visit, general matters discussed, and any pastoral concerns shall be provided to the Supervisor as soon as possible after the visit.

G. Visits to Residential Facilities

The safety of all persons and healthy boundaries are also essential when visiting a vulnerable adult in a Residential Facility. Best practices include:

- Facility staff should be informed of the visitor's presence;
- If a visit takes place out of sight of staff, they should be notified in advance and informed when such meeting is concluded;
- The door to a resident's private room must remain open during visits;
- Visitors should be mindful that LGBTQ+ residents may not be safe to express their sexual identity or orientation, as staff members may not yet have been trained; and
- In the event of uncertainty about application of this policy, the visitor is encouraged to contact their Supervisor with the relevant queries.

H. Off-Site Visits, Events, and Programs

Off-site programs, trips, and events are a welcome and often necessary means for spiritual, social, and emotional wellbeing of vulnerable adults. They also present additional challenges for maintaining best practices for safe and healthy ministry. The expectations for safe space, as described above, should be observed off-site.

In the event of uncertainty about application of this policy, the Responsible Person should contact their Supervisor with the relevant queries.

Because of the unique risks that can't always be anticipated, it is important to obtain permissions and manage documentation as described below.

1. Prior Approvals

- Prior approval by the governing body and the member of the clergy in charge is required, and that approval shall be reflected in the minutes of the governing body. Diocesan sponsored programs, trips, or events shall receive prior diocesan approval.
- These same prior approvals are required when the site is a private residence, hosting such events as cook outs, progressive dinners, etc.

In the event of uncertainty, the Responsible Person should contact the bishop's office with the relevant information.

2. Registration, Waivers, and Release Forms

Due to the unique risks of off-site visits, events, and programs that cannot always be anticipated, it is important to obtain permissions and manage documentation as described below:

- All participants shall complete and sign a registration, waiver, and release before participating in any program. Confidentiality must be preserved with respect to medical information.
    - There must be a signature on all release and waiver forms. If a person is unable to consent due to impairment or lack of agency, then the signature of that person's guardian, spouse, or other trusted family member is required. Applicable state law determines whether digital signatures are acceptable.
    - Completed release and waiver forms shall be maintained in a secure location on-site. Check with the bishop's office regarding whether such forms may be saved electronically and how long they must be retained.
- Permission slips shall be provided for each event and shall be signed by the vulnerable adult, guardian, spouse, or other trusted family member.
- Prior permission for an individual to be photographed or recorded on film, videotape, audiotape, or other electronic media is required.

3. First Aid and Medications

Current certification in First Aid, CPR, and Automated External Defibrillator (AED) is strongly encouraged for those who work with vulnerable adults.

- A first aid kit, appropriately stocked for the event and participants, shall be available in an easily accessible location.
- If a vulnerable adult requires assistance with medications of any type, then a record must be kept for all medication or first aid given to a participant. This record shall include the participant's name, the date and time of service, the

name of the person administering medication or treatment, and a description of the medication, dosage and/or treatment given.

- All medications (prescription and over the counter) belonging to vulnerable adults requiring assistance with medications shall be given to the Responsible Person, unless otherwise agreed upon.
- Only the Responsible Person, or their adult designee, shall administer medications.

I. Transportation

For the health and safety of all participants, the following practices shall be followed:

- For events that originate and/or terminate at the diocesan, congregation, or organization's facility, all drivers must be at least 21 years of age and provide proof of insurance and a current driver's license, a completed volunteer driver information form, and have a satisfactory DMV records check;
- A list of those approved to provide transportation to vulnerable adults shall be maintained in the office of the organization;
- Anyone being transported must consent to such transportation beforehand. If a person is unable to consent due to impairment or lack of agency, then prior approval by that person's guardian, spouse, or other trusted family member is required; and
- All drivers and riders must comply with state laws including seat belt and cell phone usage.

J. Insurance for Overseas Pilgrimages and Mission Trips

- Short-term trip or supplemental insurance, available through most church and organization's policies as an added rider, must be secured at-least one month prior to travel.
- It is recommended that all travelers carry evidence of personal health insurance by virtue of a copy of the actual card provided to the insured person.
- Because not all individuals have access to affordable and adequate health insurance, it is recommended that health insurance be added to trip insurance.

K. International Considerations

- Check in with the U.S. Department of State on travel requirements, including visas.
- Make certain that every traveler's passport is valid for at least six months beyond your return date.
- Determine whether or not vaccinations are required and/or recommended for entry into specific countries.

- Arrange to have at least two cell phones with the group that will have active coverage in your destination(s). Make a back-up plan for communication with your Responsible Person at home.

L. Conference and Retreat Centers

All conference and retreat centers of the diocese, congregations, and organizations shall follow the guidelines for off-site Programming established in this policy.

VIII. SEXUAL HARASSMENT OF AND BY CHURCH WORKERS

The Episcopal Diocese of Dallas prohibits all church personnel from engaging in sexual harassment. Further, the Diocese prohibits sexual harassment of church personnel by anyone (including supervisors or decision-makers, co-workers, consultants, vendors, and other non-employees). The behavior of any individuals engaging in such conduct, or supervisors or decision-makers who knowlingly allow such behavior to continue, will not be tolerated.

ALL CHURCH PERSONNEL, WHETHER SUPERVISORY OR NON-SUPERVISORY, AND WHETHER PAID OR VOLUNTEER, ARE PROHIBITED FROM ENGAGING IN THE CONDUCT PROHIBITED BY THIS POLICY.

A. Prohibited Behavior

Sexual harassment includes unwelcome sexual advances and requests for sexual favors. Other unwelcome conduct which may constitue sexual harassment includes, but is not limited to, the following:

Verbal:

- Repeated sexual innuendos, derogatory slurs, off-color jokes (for example: jokes that include sexual language, innuendo, references, scenarios, etc.)
- Propositions, threats, or suggestive or insulting sounds (for example: comments about body or sexuality, including insults and innuendo) even if the comment is about someone else
- Inappropriae email (for example: email that includes sexual jokes or other references of a sexual nature about any person, gossip, or speculation about a person's sexuality, sexual practices, sexual health, pregnancy, virility, etc.). This includes email that was sent accidentally, for example by hitting the "forward" button instead of "reply," or forgetting that a particular individual or worker is on one of your group lists.

Visual/Non-Verbal:

- Derogatory posters, cartoons, or drawings (for example: cartoons and calendars that include nudity, sex acts, provocative poses, innuendo, sexual language, etc.)
- Suggestive objects or pictures (for example: photographs that include nudity, sex acts, provocative poses; wallpaper, screensavers, or other electronic displays of a sexual nature)
- Graphic commentaries, leering, or obscene gestures (for example: vulgar gestures, gestures simulating sexual acts, "shooting the bird," kissing the air toward someone, or licking the lips in a sexually suggestive or provocative manner)

Physical

- Unwanted physical contacts (including touching, interference with an individual's normal work movement, unwelcome displays of romatic or sexual affection, aggressive physical contact or assault)

Other

- Making or threatening reprisals to an individual who opposes, objects to, or complains about sexual harassment
- Possession of inappropriate material of a sexual nature in the workplace or its display, duplication, or transmission

Such verbal and physical conduct may constitute harassment where:

- Submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment or other volunteer work
- Submission to or rejection of such conduct by an individual is used as a basis for employment or volunteer work decisions affecting such individual
- Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile, or offensive working environment

B. Retaliation

No retaliatory action will be taken against any church personnel who, in good faith and with a genuine belief that he/she has been sexually harassed, brings or voices a complaint pursuant to this Policy or otherwise opposes sexual harassment. In addition, any retaliatory acts by other individuals will not be tolerated.

Retaliation is a serious violation of church policy and applicable law. If you believe you have been subjected to retaliation in violation of this Policy, you should report your complaint immediately. Individuals will be subject to discipline, up to and including termination if they are found to have retaliated against an individual because such individual:

- In good faith and with a genuine belief that he/she has been subjected to sexual harassment, made an honest complaint about such conduct
- Participated honestly and in good faith in any investigation into a sexual harassment complaint
- In good faith opposed acts of sexual harassment

IX. RESPONDING TO CONCERNS

A. Suspected Abuse, Neglect, or Exploitation

Any adult who has reason to suspect that abuse, neglect, or exploitation of children, youth, or vulnerable adults has taken place is strongly encouraged, and all mandated reporters (church personnel) are required, to report to the Texas Department of Family and Protective Services immediately, but no later than within 48 hours from the time of the suspected abuse.

Texas Department of Family and Protective Services
Texas Abuse Hotline: 800-252-5400
www.txabusehotline.org

In addition, anyone who has reason to suspect that abuse, neglect, or exploitation of children, youth, or a vulnerable adult has taken place within a facility or program of the diocese, congregation, or other organization, should immediately complete a **Notice of Concern** (https://edod.org/ministries/safechurch/) and inform one of more or the following:

- The Assistant Bishop;
- Member of the clergy in charge or the senior warden in the case of a congregation;
- The director, head, or other governing officer in the case of other organizations; and/or
- The Intake Officer in case a member of the clergy is suspected of abuse, neglect and/or exploitation. *(Contact information for the current Intake Officer can be located here: https://edod.org/resources/title-iv-and-clergy-resources/)*

Failure to report suspected abuse of children, youth, or vulnerable adults may be a crime, in violation of Section 21.11 of the Texas Penal Code. Reports may be made confidentially or anonymously to appropriate authorities. Texas provides immunity from civil liability for persons who report suspected abuse in good faith. Simply stated, "in good faith" means that the person submitting the report believes what he or she is reporting to be true.

B. Sexual Harassment and/or Retaliation

Employers with 15 or more employees are included under Title VII of the Civil Rights Act. Employees experiencing sexual harassment and/or retaliation have the right to file a charge with the U.S. Equal Employment Opportunity Commission within 180 days of the incident. (https://www.eeoc.gov/sexual-harassment)

For all employees:

- If an individual believes that the actions or words of a supervisor/manager, co-worker, customer, vendor, volunteer, or other individual in the congregation constitutes illegal or prohibited sexual harassment, that individual has the

responsibility to promptly report the behavior to the church's management. Prompt reporting enables the church to stop the sexual harassment before it becomes severe or pervasive.

- If an individual believes he or she has been the victim of any form of sexual harassment or retaliation, that individual must promptly give notice to his or her complaint to one or more of the following:
    - His or her supervisor
    - Anyone in the supervisory chain of command
    - The rector or clergy person in charge of the congregation
    - A warden of the congregation
    - The Assistant Bishop of the diocese
- Individuals are not legally required to complain to their supervisor or within their chain of command. In addition to reporting the offending behavior to one of the people listed above, individuals are encouraged to speak directly to the individual whose conduct he or she finds objectionable, but only if he or she is comfortable doing so. If a person decides to speak directly to the other person involved, they may find that clear communication can sometimes resolve an issue immediately, as well as build greater understanding between individuals in the church. However, such discussions are not always possible, and are not required.
- An individual who believes that he or she has been the subject of sexual harassment may formally or informally complain to any of the above personnel via any of the following:
    - Telephone
    - Letter
    - Email
    - In-person meeting
    - Filing a **Notice of Concern** (https://edod.org/ministries/safechurch/)
- All supervisors and decision-makers are required to report all formal and informal complaints, as well as any suspected or known policy violations, immediately to the rector or clergy person in charge of the congregation or Assistant Bishop of the diocese. All complaints must be reported, even if the individual reporting the violation has requested that the complaint be kept confidential. Church personnel are required to report immediately any suspected or known policy violations to the rector or clergy person in charge. If the rector or clergy person in charge is part of the problem, it is appropriate for a supervisor or decision-maker to make this report directly to the Assistant Bishop.
- All supervisors and decision-makers are expected to act promptly and appropriately to prevent sexual harassment and retaliation against those who make a good faith complaint, those who participate honestly and in good faith in an investigation of a complaint, or those who oppose illegal or prohibited sexual harassment in the church.
- All complaints of sexual harassment will be reviewed and investigated promptly and impartially by church management and/or its designee. Complaints may be made verbally or in writing. Once a supervisor or decision-maker receives notice of any complaint of sexual harassment, he/she will swiftly determine whether or not a

fact-finding investigation is necessary. If it is determined that a fact-finding investigation is necessary, it will be launched promptly. If necessary, intermediate measures may be taken before completing the investigation to ensure that further sexual harassment does not occur.

- The church will protect the confidentiality of the allegations to the extent possible; however, no individual can be promised or guaranteed strict or absolute confidentiality. For example, information may have to be disclosed to those officials and/or church personnel with a need-to-know in order to carry out the purpose and intent of this Policy.
- Corrective or disciplinary action will be taken against any church personnel found to have engaged in sexual harassment. Such action may include counseling and/or appropriate disciplinary measures, up to and including termination.
- The complaintant will be given notice, in a timely fashion, of the outcome of the investigation of any formal or informal complaint.

C. Suspected Violations of this Policy

Anyone who suspects a violation of these policies shall immediately report the violation to the Responsible Person, member of the clergy in charge, and senior warden.

Clergy in charge receiving reports of violations of this policy shall be responsible for providing appropriate pastoral care to all those affected and appropriate remedial and/or disciplinary action up to and including termination of employment or unpaid ministry with the church. If the Responsible Person is a lay person, they are responsible to ensure that appropriate pastoral care is provided for all.

Anyone who suspects a violation of these policies by a member of the clergy shall immediately report the violation to the bishop's office and/or the Intake Officer. Anyone can make a report to an Intake Officer.

The bishop, hearing reports of violations by clergy, or by laity at diocesan events, shall be responsible for providing appropriate pastoral care to all those affected and appropriate remedial and/ or disciplinary action, up to and including canonical disciplinary action, as provided by Title IV of the Constitutions and Canons and/or termination of employment or unpaid ministry with the diocese.

A **Notice of Concern** form can be located here: (https://edod.org/ministries/safechurch/)

X. POLICY ADOPTION, IMPLEMENTATION, AND AUDIT

A. The Episcopal Church Adoption and Implementation

The Episcopal Church shall ensure that all programs and events of the Episcopal Church involving children, youth, and vulnerable adults comply with the standards set out in the model policy.

The Episcopal Church shall also ensure that each diocese adopts a ***Policy for the Protection of Children, Youth, and Vulnerable Adults*** in accordance with the model policy by January 1, 2019.

B. Diocesan Adoption, Implementation, and Audit

Dioceses shall adopt a ***Policy for the Protection of Children, Youth, and Vulnerable Adults*** that is consistent with and/or exceeds the requirements in the model policy.

Dioceses may adopt site-specific variations from the model policy, where permitted by their governing body, which shall be described in detail, including the circumstances under which those variations are to be permitted and their rationale. This approval shall be recorded in the minutes of the governing body.

The bishop or ecclesiastical authority for each diocese shall inform congregations and other organizations within the diocese of the contents of the diocesan policy, the requirement that each congregation or organization adopt a policy in accordance with the diocesan policy, and the vendor(s) approved by each diocese to conduct Public Records Checks.

Each diocese is required to conduct a ***Safe Church Self-Audit*** every three years to confirm compliance with diocesan Safe Church policies.

Procedures to be confirmed by audit will include (but are not limited to):

- Existence of diocesan policy that is consistent with and/or exceeds the requirements of the model policy;
- Provision of accessible and appropriate training for all those who work with children, youth, and vulnerable adults in accordance with ***Screening and Training Protocols*** (Appendix A) and ***Safe Church, Safe Communities Course Requirements*** (Appendix B).
- Verification that each congregation and/or organization within the diocese has adopted a policy that is consistent with and/or exceeds the diocesan policy; and
- Verification that each congregation and/or organization has a process to ensure members access training and conduct public record checks.

C. Congregation and Organization Adoption, Implementation, and Audit

Congregations and organizations must adopt a ***Policy for the Protection of Children, Youth, and Vulnerable Adults*** that is consistent with and/or exceeds the requirements in the model policy and the diocesan policy.

Congregations and organizations may adopt site-specific variations from diocesan policies, where permitted by vestries or governing bodies, which shall be described in detail, including the circumstances under which those variations are to be permitted and their rationale. This approval shall be recorded in the minutes of the vestry or governing body.

The ***Policy for the Protection of Children, Youth, and Vulnerable Adults*** shall be posted in an area where activities take place, and shall be given to all adults, guardians, and all paid and unpaid persons who minister to children, youth, or vulnerable adults. These policies shall include the names and phone numbers of the member of the clergy in charge, the senior warden, and a contact person in the bishop's office.

Each congregation and organization is required to conduct a ***Safe Church Self-Audit*** annually to confirm compliance with Safe Church policies, and to report such audit to the bishop's office.

Procedures to be confirmed by audit will include (but are not limited to):

- Public records checks, application forms, records of screening and reference verification of paid and unpaid persons;
- Records of compliance with ***Screening and Training Protocols*** (Appendix A);
- Transcripts reflecting completed courses appropriate to each person's function according to the ***Safe Church, Safe Communities Course Requirements*** (Appendix B).
- Procedures for responding to concerns and incidents; and
- Evidence of compliance with "safe space" requirements.

Appendix A: Screening and Training Protocols

Safe Church, Safe Communities - Screening Expectations

(The following are recommendations from the General Convention Taskforce to Update Safe Church Training)

Please consult your local policies for final authority

Recommended **S**uggested Depends on local **P**olicy		**Criminal Background Check***	**Credit Check**	**DMV Records Check****	**6 month residency *****	**Application & Interview**
Clergy	Bishops Priests Deacons Retired Clergy Postulants Seminarians	Clergy background checks are usually run by the Diocesan Transition Officer	R (for check signers)			R
Children's Ministry Worker or Volunteer	Children's Minister	R		P		R
	Children's Choir Director	R				R
	Sunday School Teacher	R			R	R
	Nursery Workers or Volunteers	R				R
	Parent Helper	R		P	R	R
	Youth Volunteers	R		P	R	R
Youth Ministry Worker or Volunteer	Youth Minister	R (if over 18)		P		R
	Youth Choir Director	R				R
	Sunday School Teacher	R			R	R
	Acolyte Leader	R			R	R
	Camp Counselor	R (if over 18)		P		R
	Small Group Leader	R		P	R	R
	Counselor-in-Training				R	R
	Youth Volunteers	R			R	R
	Confirmation Mentor	R		P	R	R
Elected Positions	Elected Positions	R	R (for check signers)		R	
	Treasurer	R				
	Vestry	R			R	
	Wardens	R			R	
	Convention Delegates	R				
Key Holders	Altar Guild	R			R	
	Building Hosts	R			R	
	Renters					
Lay Leadership	Eucharistic Visitors	R		P	R	R
	Stephen Ministers	R			R	R
	Small Group Leaders	R			R	R
	Eucharistic Ministers	R			R	R
	Unpaid Church Staff	R	R (for check signers)			R
Other Paid Church Staff	Adult Choir/Music Directors	R	R (for check signers)			R
	Vergers	R				R
	Sextons	R				R
	Administrators	R				R
Other Youth & Children's Ministries	Day Camp staff (minors & adults)	R (if over 18)		P		R
	VBS Volunteers	R (if over 18)			R	R
	Sleepover Chaperones	R			R	R
	Camp Staff (minors & adults)	R (if over 18)		P		R
	Adult Leaders and Volunteers for Chartered Scouting Troops (BSA, GSA, Campfire, etc.)	R		P		
School Staff (Preschools, Day Cares, Elementary, High Schools) These courses are recommended in addition to any trainings required by local regulations.	Administration & Staff					R
	Teachers, Classroom Aides, & Library Staff	R				R
	Chaplains (both lay and ordained)	R				R
	Athletic Staff (Coaches, Assistants, Trainers, etc)	R				R
	Support Staff (eg. Cafeteria staff, bus drivers, custodial, security, etc)	R				R
	Empolyees & Volunteers	R				R
	Before & After School Care/Program Staff	R		P		R
	Parent Volunteers	R		P		
	Board of Directors	R				

* Background checks cannot be run on minors

** DMV record checks are recommended for anyone driving an official church vehicle or their own vehicle in an official capacity

*** a person should be invested in and known by the community for at least 6 months before being given a position of trust.
R= Recommended

updated 6/28/2022

Appendix B: Safe Church Course Requirements

Safe Church, Safe Communities - Course Requirements

R - Required S - Suggested		Introduction & Theological Background	Organizational Rules & Policies	Healthy Boundaries	Power & Relationships	Abuse & Neglect	Inclusion	Pastoral Relationships	Anti-Harassment*	Bullying	Duty to Report	Policies of the Diocese of Dallas
Clergy	Bishop Priest Deacon Retired Clergy Seminarian	R	R	R	R	R	R	R	R	R	R	R
Children's Ministry Worker or Volunteer	Children's Minister Children's Choir Director Sunday School Teacher Nursery Worker or Volunteer Parent Helper Youth Volunteer	R	R	R	S		R		R	R	R	R
Youth Ministry Worker or Volunteer	Youth Minister Youth Choir Director Sunday School Teacher Acolyte Leader Camp Counselor Small Group Leader Counselor-in-Training Youth Volunteer Confirmation Mentor	R	R	R	S	R	R	R	S	R	R	R
Elected Position	Warden Treasurer Vestry Convention Delegate	R	R	R	R	S	R	R	R	R	R	R
Key Holder	Altar Guild Building Host Renter	R	R	R							R	R
Lay Leadership	Eucharistic Minister/Visitor Stephen Minister Small Group Leader Unpaid Church Staff	R	R	R	R	R *(for those who do home and/or hospital visits)*	R	R	R	R	R	R
Other Paid Staff	Administrator Adult Choir/Music Director Sexton Verger	R	R	R	R	S		R	R	R	R	R
Other Youth & Children's Ministries	Day Camp Staff (minors & adults) VBS Volunteer Sleepover Chaperones Camp Staff (minors & adults) Adult Leader/Volunteer for Chartered Scouting Troops (BSA, GSA, Campfire, etc.)	R	R	R	R	R	R	R	R	R	R	R
School Staff (Preschool, Day Care, Elementary, High School)	Administration & Staff Teacher, Classroom Aid, & Library Staff Chaplain (both lay & ordained) Athletic Staff (Coach, Assistant, Trainer, etc.) Support Staff (eg. Cafeteria staff, bus driver, custodial, security, etc.)	R	R	R	R	R	R	R	R	R	R	R
These courses are in addition to any trainings required by local regulations	Employee & Volunteer Before & After School Care Program Staff Parent Volunteer Board of Directors											

***Anti-Harassment module is not available until August 1, 2022. Until then, "Safeguarding God's People: Preventing Sexual Harassment for Managers & Supervisors" should be taken as the equivalent**

Appendix C: Recommended Practices and Guidelines for Social Media and Electronic Communications

Social media shapes the lives of young people, is an ever-increasing part of adult lives, and has the potential to empower ministry. Behavior in the digital sphere is never private. Posted content may be used out of context and out of the control of the originating individuals and organizations, putting them at risk. In addition, these powerfully connective tools are subject to the same dynamic of unequal power and potential for abuse that present a risk in all ministry relationships. Churches face the challenge of identifying and proactively addressing areas of potential risk in social media use in the midst of rapidly evolving technology. The following recommended practices and guidelines are designed to be a flexible template for developing policies and covenants governing the safe use of social media and digital communication in ministry settings.

General Information about Digital Communications

- All communications sent digitally (email, social networking sites or platforms, notes, texts, or posts, etc.) are NOT CONFIDENTIAL and can be shared or reposted to others.
- Interactions in the virtual world need to be transparent; that is, occurring in such a way that it is easy for others to see what actions are performed.
- In the virtual world, healthy boundaries and Safe Church practices must be adhered to as they are in the physical world.
- In the virtual world, "friend" can mean anyone with whom you are willing to communicate through that medium. In the physical world, friend can mean much more in terms of intimacy, self-disclosure, mutuality, and expectations for relationship.
- Laws regarding mandated reporting of suspected abuse, neglect, or exploitation of children, youth, or vulnerable adults apply in the virtual world as they do in the physical world. Check your local applicable laws.

Recommended Practices and Guidelines for Churches and Organizations:

- Establish a policy that outlines professional and institutional standards for profiles and interactions on social networking sites and platforms.
- Establish a policy of transparency regarding social media accounts. The best practice is to have the diocese, congregation, or organization create and "own" the social media accounts representing the diocese, congregation, or organization respectively and have multiple administrators and/or supervisors with access. If personal accounts are used, a system of monitoring should be established.
- Establish a policy regarding the identification or "tagging" of individuals in online photos or videos. For example, on Facebook, "tagging" someone in a photo or video creates a hyperlink to that person's profile page that can be

clicked by anyone. The best practice is for the diocese, congregation, or organization not to identify or "tag" individuals.

The "tagging" of children and youth should be prohibited. When written permission is provided by a parent/guardian, the captioning of photos or videos of minors may be permitted. The caption should not include the minor's full name, nor should it create a clickable link to someone's personal profile.

The captioning of photos or videos may be permitted when written permission is provided by a vulnerable adult (or the person's guardian, spouse, or other trusted family member when the vulnerable adult is unable to consent due to impairment or lack of agency). The caption should not include the individual's full name, nor should it create a clickable link to someone's personal profile.

A policy of whether or not an individual can "self-tag" in a diocese, congregation, or organization's online photo or video should also be established.

- A diocese, congregation, or organization does not have a responsibility to review or monitor the personal pages or groups that are not sponsored by that diocese, congregation, or organization, except as described in #2 above. The preceding statement should be included in the diocese, congregation, or organization's Social Media Policy.
- Email can be a good method of communication, and it also has the opportunity to be misunderstood. Having a clear understanding and procedure for responding to digital communication that raises concern is prudent for all. Best practices can include not responding immediately and sharing the communication with a supervisor before responding. Phone and face-to-face meetings are preferred when responding to emotionally driven communications or pastoral emergencies.
- When using photos and videos for ministry purposes, obtain a media release for each person and only post images that respect the dignity of every person depicted.
- Dioceses, congregations, or organizations must inform participants when they are being videoed because church buildings are not considered public space. Signs should be posted that indicate a service or activity will be broadcast when worship services or activities are streamed or distributed on the web or via other broadcast media.

Recommended Practices and Guidelines for Interactions with Children, Youth, and Vulnerable Adults:

- Prudent judgement should be used in the time of day a child, youth, or vulnerable adult is contacted through social media. Under normal circumstances, refrain from contact or exchanging texts, chats, or emails before 8:00 am or after 10:00 pm, unless it's an emergency.
- Privacy settings and personal boundaries should be implemented.

- Create and use profiles on social networking sites that meet professional and institutional standards.
- Do not submit connection requests (such as friend requests on Facebook or "Add Me" on Snapchat) to children or youth for personal interactions. Youth may not be able to decline such requests due to the disparity of power between youth and adults. Youth may ask to be "friends," and adults should discern the nature of contact appropriate for healthy ministry.
- Apply privacy settings that are consistent with all children, youth, and vulnerable adults, across all social networking sites and platforms. Avoid playing favorites or the appearance of playing favorites.
- Establish a regular ongoing and consistent system of review that focuses on settings, accessible content, photos, and videos to ensure compliance with professional and institutional standards.
- Inform parents of children and youth of social networking sites and platforms used within the ministry.
- When possible, send communication (1) to entire groups, (2) on an individual's "wall," or (3) in public areas, rather than in private messages. This includes photos, images and videos.
- When sending emails to a child or youth that contain personal or private information regarding that child or youth, a copy should be sent to the parents or guardians as well. Examples of these types of emails include: payment due information, specific medical requests or questions, etc. Mass emails sent to an entire group are not required to be copied to parents or guardians.
- Disclose **ongoing** digital pastoral communications (ie: e-mails, Facebook messages, texting, etc) with children and youth to a parent and/or a supervisor to determine when a referral to a professional provider or resource is needed.

- Create covenants to govern digital groups, which include:
  - Appropriate and inappropriate behavior of members (bullying, pictures that depict abuse, violence, illegal activities, sexual acts, etc.) and the consequence for inappropriate behavior;
  - Who may join and/or view group activity, when participants should leave the group and when/if the group will be disbanded;
  - Description of content that can be posted or published on the site or page;
  - A prohibition of "tagging" photos and videos of children and youth. However, the captioning of photos and videos is permissible with written permission from a parent or guardian;

    - Discourage "tagging" photos and videos of vulnerable adults. However, the captioning of photos and videos is permissible with appropriate written permission as described above;
    - Notification that mandatory reporting laws will be followed; and
    - Consequences for breaking the covenant.
- Delete inappropriate material posted in digital groups, address the behavior and report it, if necessary, in accordance with legal and institutional requirements.
- In video calls, follow the same criteria used in telephone calls. In addition, prudent judgement regarding attire and surroundings should be observed.
- Comply with the following best practices regarding "groups" on social networking sites:
    - Have at least two unrelated adult administrators as well as at least two youth administrators for groups that are designed for youth;
    - Have at least two unrelated administrators for groups that are designed for vulnerable adults;
    - Use closed groups, but not "hidden" or "secret" groups, for youth or vulnerable adults;
    - Have only youth administrators invite other youth to join the online group, unless a youth previously asked an adult administrator to invite them to join;
    - Remove any content that shows or describes inappropriate behavior outside the bounds of the established behavioral covenant;
    - Open social networking groups for youth to parents of current members;
    - Remove adult leaders of youth groups and youth who are no longer members, due to departure, removal from position, or are ineligible because they "aged-out" of a program from social networking sites, list serves, etc;
    - Observe mandated reporting laws regarding suspected abuse, neglect, and exploitation.

Appendix D: Guidelines for Office Décor for Persons who have Pastoral Relationships

The following are recommendations that will help create an environment that provides a confidential and peaceful setting, while allowing appropriate supervision. There guidelines are intended to protect both persons receiving pastoral care as well as the persons who have pastoral relationships from accusations.

Furniture

Comfortable chairs set at a 45-degree angle from each other create a good area for conversation. Couches and loveseats are discouraged, as are chairs that recline. Persons who have pastoral relationships should not sit on a couch or loveseat with parishioners or other visitors.

Artwork

Artwork should be tasteful, and should not have anything that could be considered offensive to staff, volunteers, or other visitors.

Windows

Windows in walls or doors should be unobstructed by blinds, furniture, curtains, or posters so that the space is always available to casual monitoring. A sense of privacy can be maintained by arranging the furniture so the persons who have pastoral relationships are always visible, but the parishioner or visitor does not feel exposed.

Entrances

Entrances to the space should be accessible to others. If a private entrance is used to accept visitors, staff must be notified when someone has entered through the private entrance.